AIM Special Education Forms

Creating the IEP and Supplemental Documents

opi.mt.gov

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Beginning the Individualized Education Plan (IEP)

To begin a new IEP for a student, select the IEP that you want to use from the "Create New Form" drop-down list on the Documents tab.

- MT IEP – this is the most common IEP that will be used. It is designed for all students age six (6) through age fourteen (14).
- MT 3-5-Year-Old IEP – is specifically designed for all students ages three (3), four (4) or five (5) years.
- MT Transition IEP – this IEP is for all students beginning at age fifteen (15), and any other students for whom the IEP team decides to do transition planning.
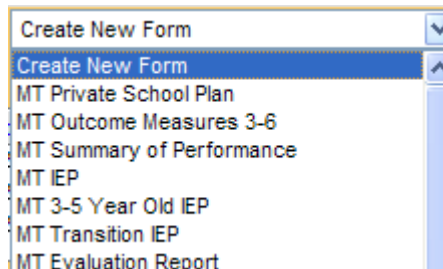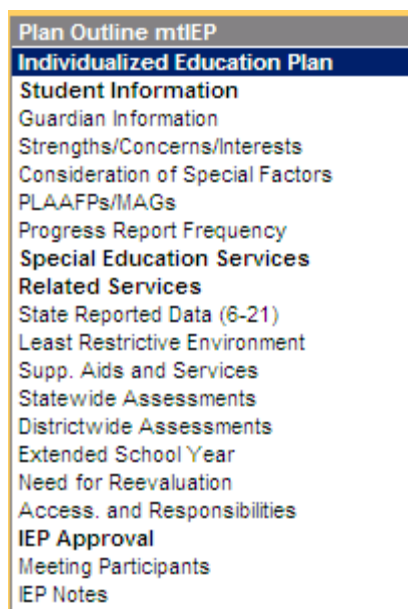
> **Technical Note: Selecting the Correct Plan**
>
> Make sure to select the correct IEP Plan. The MT 3-5 and MT Transition IEP have additional elements required by students of different ages. Choosing the incorrect plan will omit critical elements, leading to noncompliance.

Individualized Education Plan

The menu at the left contains all of the editors needed to write an IEP. The first editor should automatically open when you have selected the applicable IEP.

Three information elements are required, as noted in text, and marked with an asterisk (*). These elements are: *Meeting Date, *Start Date, and *End Date.

A click to the calendar icon opens a calendar and allows you to pick a meeting date. Entering a date into the *Meeting Date box automatically populates the *Start Date as the day after the IEP meeting date and the *End Date as 365 days after the IEP Start Date in these boxes, as shown here.

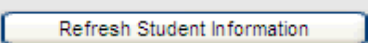| *Meeting Date	*Start Date	*End Date
08/26/2008	08/27/2008	08/26/2009

Last Re-Evaluation:
08/04/2008

Note that the [Last Re-Evaluation: 08/04/2008] also populates automatically with the date of the most recent evaluation or reevaluation.

Click on 🖫 Save or 📑 Save & Continue to continue working through your IEP.

Student Information

When you select the **Student Information** editor from the list, the editor window below opens to refresh the information about the student. This editor functions just like the one you used in the *MT Evaluation Report*. Click on the Refresh Student Information button to update student demographic information from the Census tool in AIM. The next editor, **Parent/Guardian Demographics**, operates the same way, except it refreshes information about the parent/guardian.

Summary	Team Members	Documents	Contact Log

🖫 Save 📑 Save & Continue 🖨 Print

Plan Outline mtIEP

Individualized Education Plan
Student Information
Guardian Information
Strengths/Concerns/Interests
Consideration of Special Factors
PLAAFPs/MAGs
Progress Report Frequency
Special Education Services
Related Services
State Reported Data (6-21)
Least Restrictive Environment
Supp. Aids and Services
Statewide Assessments
Districtwide Assessments
Extended School Year
Need for Reevaluation
Access. and Responsibilities
IEP Approval
Meeting Participants

Student Information
Note: At the point the plan is generated, a snapshot of the student data is taken. To get a fresh copy, click the button below.

[Refresh Student Information]

Last Name	First Name	Middle Name	Gender

Race, Ethnicity :		Birthdate

Student Address

School Name	School Phone	Student Number	Grade

Always click on the Refresh Student Information button in the middle and the system will update the IEP with information from the Infinite Campus Census tool.   The demographics box should contain the information displayed in the **Summary** tab.
Contact your District AIM Specialist if the information is not up to date.

> **Recommended Practice**
>
> Demographic editors have buttons that "refresh" or "get" information. Whenever one appears, always click it.

Click on `💾 Save` or `📑 Save & Continue` to continue working through your IEP.

Strengths/Concerns/Interests

Selecting `Strengths/Concerns/Interests` opens the Editor below and allows you to enter information about each of the five content areas.

If the parent or student did not attend the meeting, write "Parent did not attend" or "Student did not attend" in the pertinent text boxes. If the parent or adult student attended the meeting but did not offer input, write "Parent had no comments" or "Student had no comments."

You may enter information into the expandable text boxes either by typing directly into a box or by copying text from a separate word processed document and pasting the text into the box.

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...roval
...Participants
...s

Strengths, Educational Concerns and Preferences/Interests

Student perception of strengths, preferences and interests:

Student perspective of strengths, or Student did not attend meeting or Student had no comments

Parent perception of student strengths:

Parent perspecitive of strengths, or Parent did not attend meeting or Parent had no comments

School staff perception of student strengths:

Staff perception of strengths.

Parent perception of student educational needs:

What does the parent think the student's educational needs are?

School staff perception of student educational needs:

What does the school staff perceive to be the student's educational needs?

Consideration of Special Factors

This editor requires you to choose either a "Yes" or "No" for each of the three Special Factors. The required Special Factors are shown in red with an asterisk (*). These Special Factors are:

*The student's behavior impedes his/her learning or that of others. ,

*The student has communication needs. , and

The student requires assistive technology devices or services. .

After considering whether the student has behavior, communication, or assistive technology needs, the IEP team must consider Special Factors applicable to students with blindness or visual impairments.

If an *Evaluation Report* did not identify the student as having blindness or visual impairment, check the Not Applicable box as shown here. If the student was determined to have blindness or visual impairment, select the appropriate choice (yes/no) from the drop-down lists next to the questions under the heading "For a Student with Blindness or Visual Impairment" shown at the right.

Please note also that in the past the IEP team had to consider whether the student had been determined to be "Limited English Proficient." This software allows the district to make this determination as part of the student's enrollment status. A record of that decision is then in the database. The determination will still be shown on the printed IEP. Click the Save icon to save your work. Click the Save & Continue icon to save your work and bring up the next IEP editor.

PLAAFPs/MAGs

Selecting **PLAAFPs/MAGs** from the editor list brings up the editor below.

Click on the   **New PLAAFP/MAGs**   icon. Select a Service Area of Need. These are the same as those listed in the Evaluation Report for special education services and related services. This list is locked by the OPI and cannot be changede.

The guidelines for writing a statement of PLAAFP and MAG appear in the gray areas above each expandable text box.

You can type your MAG, cut and paste from another document or use the template bank (if you district has provided the content). To use the template bank, save the MAG without entering any text. Then click on the MAG statement.
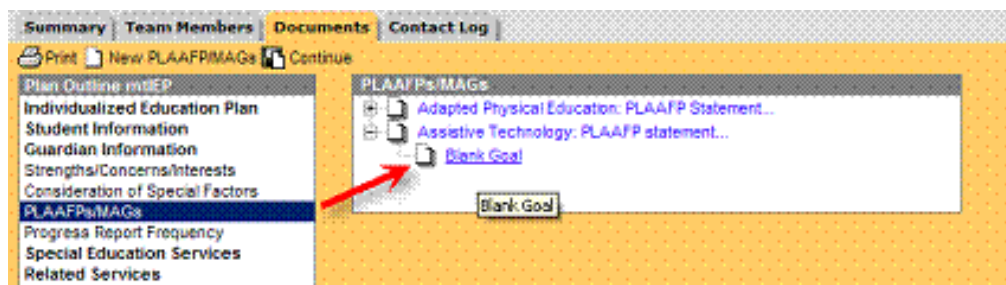
And then click on the template bank to choose your MAG.
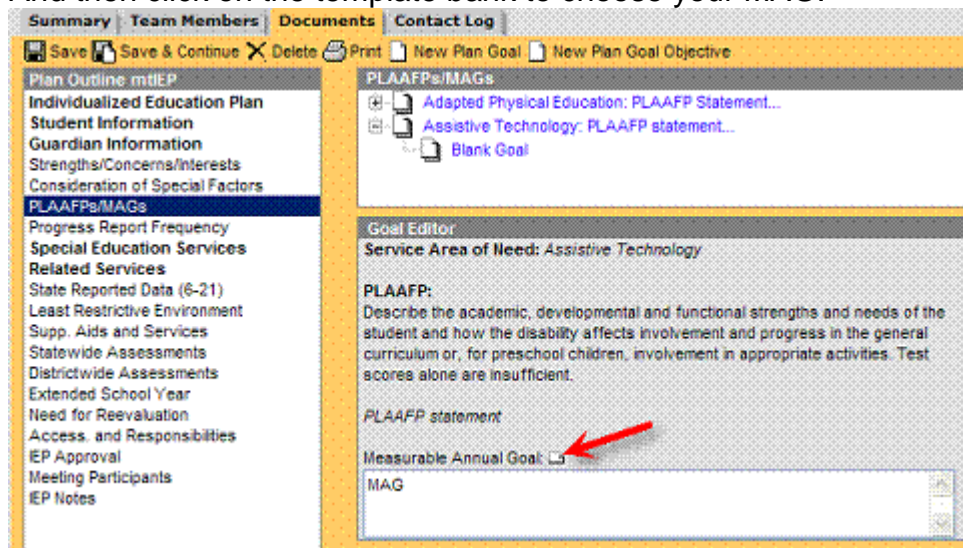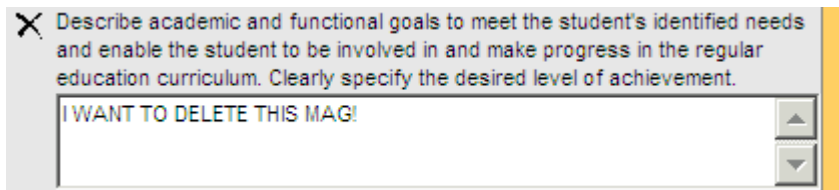
Indicate whether the MAG must be addressed during an extended school year service. Next, consider whether another MAG would be needed within this Service Area of Need and PLAAFP. If so, click the **Add PlanGoal** icon at the bottom of the page and repeat the same steps. The PLAAFPs/MAGs will appear in the uppermost box as shown below.

To delete a Measurable Annual Goal that is not needed, open the PLAAFP/MAG and click on the **X** next to the goal:

You will receive this warning:
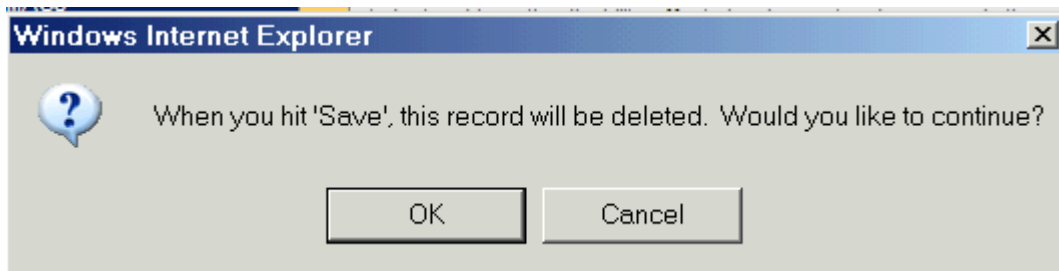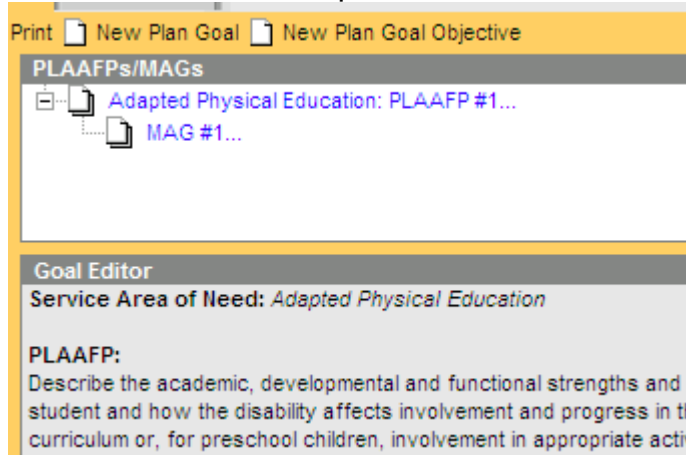
Click "OK" to delete the Measurable Annual Goal.

To delete an entire PLAAFP/MAG after you have written it, you must have administrative rights. Without these rights the ✕ Delete button will be grayed-out. Your district will determine what level of rights you have.

You can also open the Service Area of Need and at the top of the list there is a blank area. Choose this area and no service area will be listed on the IEP, though it will still print as a blank PLAAFP/MAG.
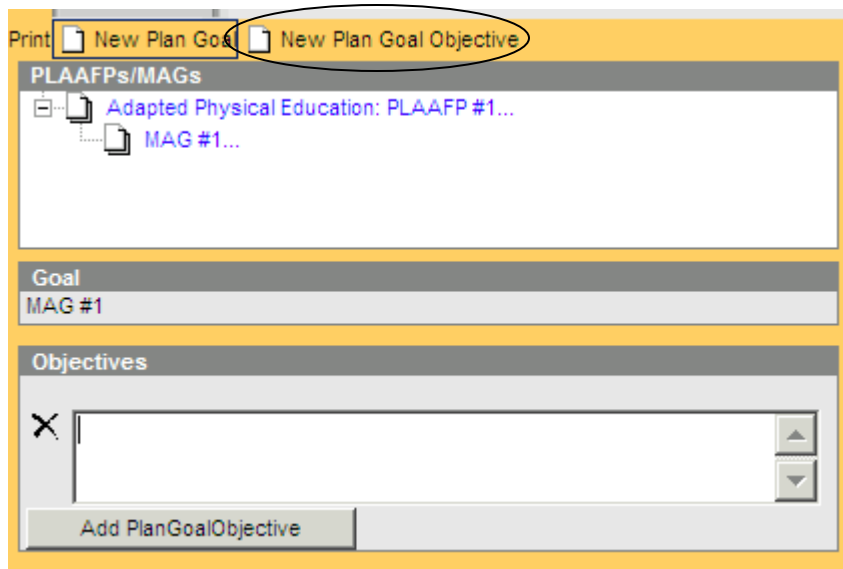
Writing Short-term Objectives and Benchmarks

After saving a PLAAFP/MAG, click on the "**+**" mark next to the PLAAFP and then click on the MAG. This will open a new screen:

With a choice for ☐ New Plan Goal Objective directly above the blue PLAAFP/MAG text. Click on the ☐ New Plan Goal Objective to write your short-term objective or benchmark.
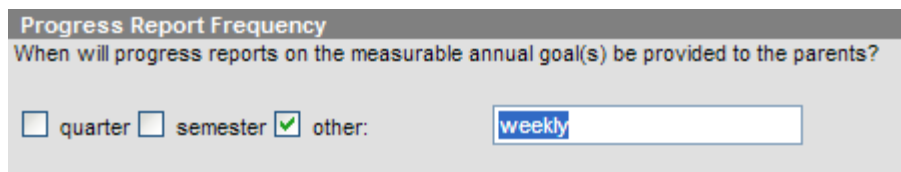
Click on the ☐ Print icon to view your work on the IEP form itself.

Click the ☐ Save icon to store your work. Click the ☐ Save & Continue icon to store your work and bring up the next IEP editor.

Progress Report Frequency
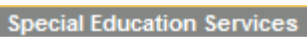
This editor is used to report the frequency with which a student's progress will be reported to the parents. Select one of the choices on the editor and click the ▣ Save & Continue icon to store your work and bring up the next IEP editor.
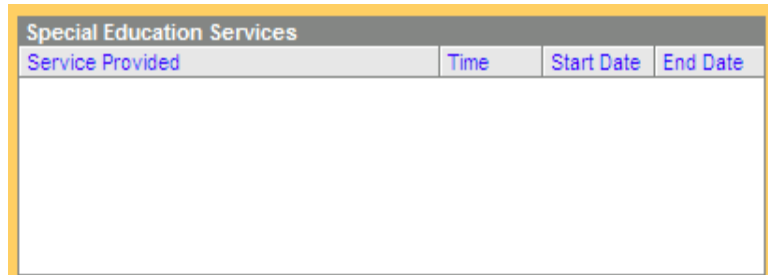
Progress Report Frequency
When will progress reports on the measurable annual goal(s) be provided to the parents?

☐ quarter ☐ semester ☑ other: weekly

Special Education Services

Selecting the Special Education Services editor from the list bring up the box shown below.

Special Education Services
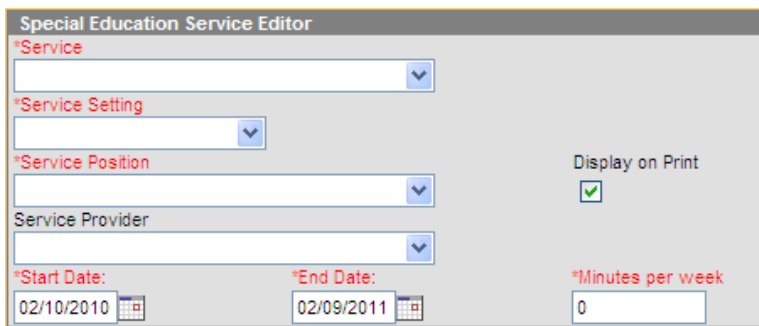
Service Provided	Time	Start Date	End Date

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IEP Notes

To identify the special education services needed, begin by clicking the ☐ New Service Provided icon at the top of the page to access the Special Education Service Editor. This editor requires you to choose one item from three required and one optional lists, establish two dates, and enter the amount of time required for the service. The required items are shown in red with an asterisk (*). Required elements are:

*Service,
*Service Setting,
*Service Position,
*Start Date,
*End Date, and
*Minutes per Week.

Special Education Service Editor

*Service
[▼]

*Service Setting
[▼]

*Service Position
[▼]   Display on Print
                            ☑

Service Provider
[▼]

*Start Date: *End Date: *Minutes per week
02/10/2010   02/09/2011   0

First, click the arrow on the *Service drop-down list to view the list of special education services (shown at the right) and select the service previously identified in the PLAAFP/MAG editor above. This list of special education services is fully inclusive; that is, no other service choices are available. The list of special education services is identical to the list in the Service Area of Need drop-down list on the PLAAFP/MAG editor, and the Special Education Services on the Recommendations editor of the *MT Evaluation Report*.

Adapted Physical Education
Assistive Technology
Braille Instruction
Career/Vocational
Communication
Math
Reading
Self-Help/Independence
Sensory-Motor
Social/Emotional/Behavioral
Speech/Language
Transition
Travel Training
Written Expression

Next, click the arrow on the Service Setting drop-down list and select the appropriate option indicating the environment in which individualized instruction will be delivered. Choose either Regular Education Setting, or Special Education Setting.

Indicate the position/job title of the licensed professional delivering the individualized instruction by selecting an appropriate position from the *Service Position drop-down list (this list is populated at the district level by the system administrator). This step is required for all IEPs. Please note that this step identifies a "position" or job title, and does not identify a specific individual. The list of positions in the *Service Position drop-down list should be fully inclusive of all positions supported by the district. If you notice a position is not on the list that should be, contact your district AIM System Administrator, or Special Education Administrator.

Clicking the arrow on the Service Provider drop-down list will bring up the district's list of special education personnel, if available, in your district. The OPI does not require an IEP to identify by name the person who will deliver the special education service in the Service Provider drop-down list. Some districts may use this for Medicaid billing purposes.

The next step identifies the *Start Date: and *End Date: for the particular service. These dates will be prefilled from the start and end dates of the IEP that were selected on the first editor. If they need to be changed, use the calendar functions 12/04/2008 to identify the appropriate dates.
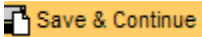
Finally, enter the number of *Minutes per week that the service will be delivered to the student.

December 2009
S M T W T F S
29 30 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31 1 2
3 4 5 6 7 8 9
Today
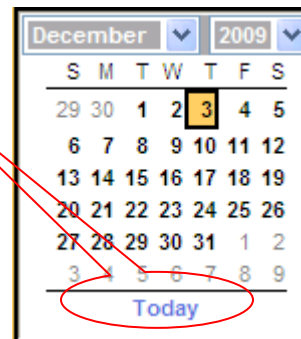
Click the icon to store your work. After saving, the editor at the top of the workspace will display the service(s) you have selected for your student, as shown below.

Special Education Services			
Service Provided	Time	Start Date	End Date
Adapted Physical Education	45.0	02/27/2009	02/26/2010

Repeat these steps for each Special Education Service the student needs.   Click on followed by to add additional Special Education Services.

When you have finished entering all of the Special Education Services needed, click on or to continue working through your IEP.

Related Services

The AIM system uses exactly the same procedures to develop the Related Services (shown at right) that it uses to produce Special Education Services. This is the all-inclusive list from the Recommendations editor of the *MT Evaluation Report.*

Assistive Technology
Audiology
Counseling
Occupational Therapy
Orientation and Mobility
Other (describe in notes)
Other Specialist
Outside Agency
Parent Counseling and Training
Part C Service Coordinator
Physical Therapy
Psychological
Recreation
Rehabilitation Counseling
School Health/Nurse Services
School Psychologist
Social Work in Schools
Speech/Language
Speech/Languare Pathologist
Therapeutic Recreation
Transportation

Technical Note: Transportation

Transportation as a service typically has no direct instruction of or measurable annual goals for the student. Since the AIM system will not accept "0" minutes, use one (1) minute. The "1" serves as a placeholder and allows the software to calculate its time functions.

State-Reported Data (6-21)

Click on State Reported Data (6-21) in the Plan Outline (list of editors).

Special Ed State Reported Data Elements (6-21)

Note: At the point the plan is generated, a snapshot of the student data is taken. To get a fresh copy, click the button below.

    Get Special Ed Status from Enrollment

    Get Dominant Disability from Evaluation

The editable values will change the values in the IEP and it will update the special ed status values in any enrollments that intersect the dates of the plan. The update of the enrollment will only occur when the plan is marked completed.

State ID

Primary Disability
:

Special Ed Status
:

Plan Outline mtlEP

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IEP Notes

Most of the information needed should already be stored in your school's Infinite Campus database. All you need to do is click on the

    Get Special Ed Status from Enrollment   and the   Get Dominant Disability from Evaluation

buttons to refresh information about the student. Clicking on these buttons will populate the information that is needed to continue and show that information under State ID, Primary Disability, and Special Ed Status. If the information does not appear, check to see if an Evaluation Report has been entered for the student. If one has not, complete the Mini "E" Report (instructions separate) to get in the basic information needed to calculate the dominant disability.
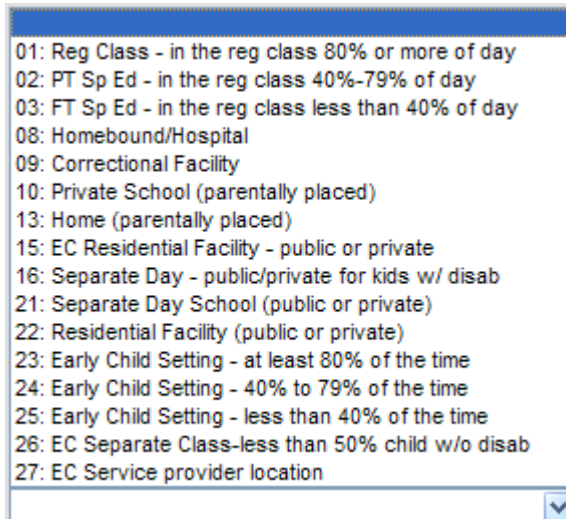
To have the system automatically calculate the student's Special Education Setting, enter the Total Instructional Minutes per week (this is all minutes that the student spends in an educational setting, including lunch, recess, and between classes) and click the   Auto-Calculate Special Ed Setting   button.

Total Instructional Minutes (per week)

1800   Auto-Calculate Special Ed Setting

Special Ed Setting

Resident District
:

Home Primary Language
:

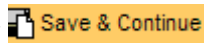**Technical Note: Instructional Minutes Per Week**

Your district has determined the number of instructional minutes per week. Contact your building principal or special education director to find this number.

If the student is attending a Residential Treatment Facility, Correctional Facility, or is in a Homebound/Hospital setting, simply click on the arrow of the drop-down list for *Special Education Setting* and select the appropriate setting. For students aged 3, 4 or 5, the *MT 3-5-Year-Old IEP* will calculate based on instructional minutes and age. The calculation can only be done after the Special Education and Related Services Editors have been completed.

The student's resident district and home primary language will appear if that information has been entered for the student by your district's AIM specialist. This data is not required for all students. No input is needed while developing an IEP.
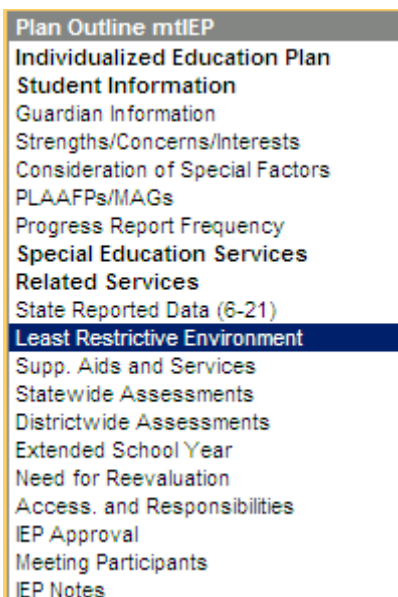
Click on [Save] or [Save & Continue] to continue working through the IEP.

Least Restrictive Environment

To document the team's consideration of Least Restrictive Environment (LRE) concerns, select [Least Restrictive Environment] from the plan outline on the left side of your workspace (the list is shown at the right).

Doing so brings up the [Least Restrictive Environment] editor shown below. You must address each of the four questions with either a Yes or No. If you indicated a "No" in any of the four boxes, you must explain the reason why the team made that choice.

Note that your district may offer a template that will assist you to provide the necessary documentation. To access that template blank, click on: [If "No" is checked, explain why] .

Least Restrictive Environment

Yes	No	
☑	☐	The educational placement is based on the student's IEP
☐	☑	The educational placement is as close as possible to the student's home.
☑	☐	The educational placement is in the school that the student would attend if he or she did not have a disability.
☑	☐	The IEP team considered any potential harmful effect of the educational placement on the student or on the quality of needed services.

If "No" is checked, explain why ⬜

> Least Restrictive Environment Message

If the student's school day or week is shorter or longer than peers without disabilities, explain why. ⬜

> Due to safety issues, this student arrives to school after and leaves from school a few minutes before the majority of students.

If the student's school day or week is the same as other students, click on the 🗐 Save & Continue icon to continue on with the IEP. If the student's day or school week is longer or shorter than that of regular education students, you must write an explanation in the expandable text box. As with other text entry requirements, you may type directly into the text box or copy and paste information from another document into the text box. The district may provide a template bank that will guide your documentation efforts.

Click on 🗐 Save or 🗐 Save & Continue to continue working through your IEP.

Supplementary Aids and Services

Click on [Supp. Aids and Services] from the Plan Outline to open the Supplementary Aids and Services editor.

Enter a description of the accommodations and modifications, supplementary aids and services, and other forms of support the student needs into the expandable text box. Note that the protocol is to list the accommodation first, and then the classes in which it will be used.

If your district has developed a template to assist with the description of accommodations, modifications, supplementary aids, and services, a click on the 🖵 will bring up that template. When finished, click the [🖫 Save & Continue] icon to move to the next editor.

Technical Note: Supplementary Aids and Services

The district may develop lists of accommodations, modifications, and supplementary aids and services appropriate for specific schools, grades, or student ages. The case manager may copy and paste this information directly into this editor or may upload the entire document.
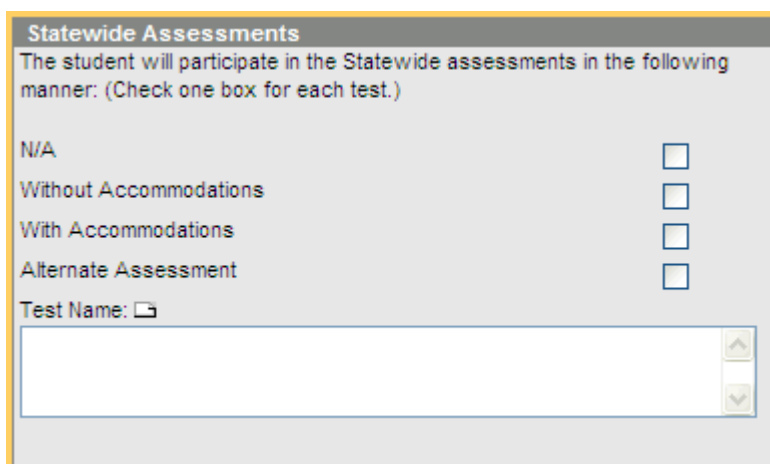
Statewide Assessments and Districtwide Assessments

Click on [Statewide Assessments] in the plan outline and the editor below opens.

Click on the [New Assessment] icon and check the appropriate box that describes the student's need for Accommodations or an Alternate Assessment. If the student is taking an Alternate Assessment, check that box and indicate the name of the test.

Statewide Assessments

The student will participate in the Statewide assessments in the following manner: (Check one box for each test.)

N/A	☐
Without Accommodations	☐
With Accommodations	☐
Alternate Assessment	☐

Test Name: 🗀

Your district may have created a template that lists the names of assessments, including alternatives. When you click the [Test Name:] icon you will access the district's template bank of assessments. Identify the assessment by using the template, by typing in the name of the assessment, or by using the cut and paste method.

Complete the discussion of Statewide Assessments by identifying the specific accommodations that the student needs and document those in the text-box. Again, you may use your district's template bank or other method to identify accommodations.

For students who take the alternate assessment, indicate why the student cannot participate in the regular assessment and describe why the alternative assessment selected is appropriate for the student.
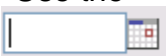
Repeat the same steps for the Districtwide Assessments Editor.

When finished, click the 🖫 Save & Continue icon to move to the next Editor.
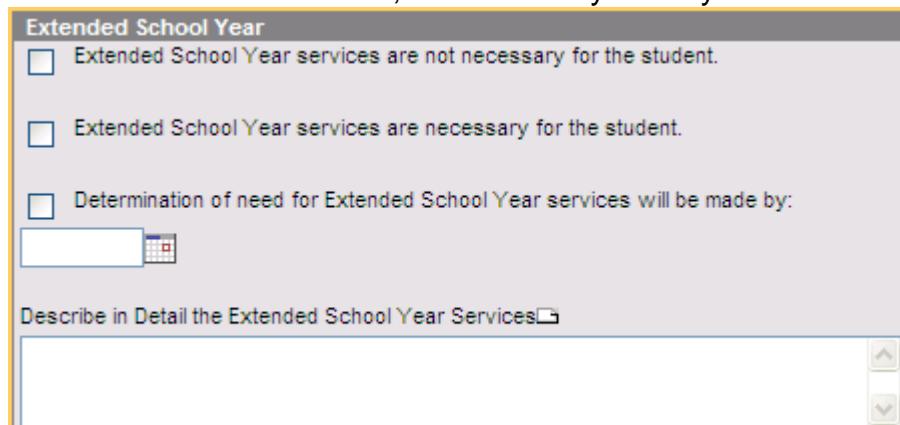
Extended School Year

The team must consider the student's need for an Extended School Year (ESY). Select Extended School Year from the plan outline. To complete the editor, select one of the three checkboxes provided for documenting the team's consideration of the need for an extended school year program.

If the team decides to defer the decision about ESY, it must clearly identify the date on which the team will meet to make the decision. Use the date box [ ] to record the date.

Extended School Year

☐ Extended School Year services are not necessary for the student.

☐ Extended School Year services are necessary for the student.

☐ Determination of need for Extended School Year services will be made by:
[ ]

Describe in Detail the Extended School Year Services

If the team decides that the student needs an ESY, you may use the expandable text box Describe in Detail the Extended School Year Services to describe in detail what ESY services will be provided. You may use a district-produced template to describe the services, or you may write directly into the box, or you may copy and paste from another document.

Click on 🖫 Save or 🖫 Save & Continue to continue working through your IEP.

Need for Reevaluation

To document that the team considered the student's need for reevaluation (if applicable), select `Need for Reevaluation` from the plan outline. To complete the editor, select one of the checkboxes that document whether a reevaluation is unnecessary at this time or if it is necessary to determine whether the student continues to have a disability and needs special education.

Click on `Save` or `Save & Continue` to continue working through your IEP.

Access and Responsibilities

To document how the appropriate individuals will be informed of their specific duties in implementing the student's IEP, select `Access. and Responsibilities` from the plan outline. Select one or more of the checkboxes. You may use the expandable text box to add additional information, or to describe some "other" method of communication.

Click on `Save` or `Save & Continue` to continue working through your IEP.

IEP Approval

The AIM system allows for an electronic record of the parent's approval of the IEP. To record this, select **IEP Approval** from the plan outline to bring up the editor below.
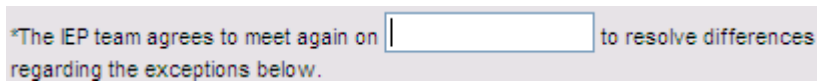
IEP Approval

I have read and understand my rights as provided to me in the pamphlet PROCEDURAL SAFEGUARDS IN SPECIAL EDUCATION UNDER IDEA, which I received this school year. The parent shall be given a copy of this IEP at no cost to the parent

☐ I approve of this Individualized Education Program.

☐ I approve of this Individualized Education Program with the following exceptions*

Signature _____   Date _____

*The IEP team agrees to meet again on [   ] to resolve differences regarding the exceptions below.

Exceptions:

[   ]

To complete the editor, select one of the two checkboxes provided for documenting parental consent. Make sure the parent signs the hard copy. The hard copy will be stored in the paper file, and a copy given to the parent.

If there are exceptions to the IEP, the team agrees to meet again to resolve the exceptions identified.

*The IEP team agrees to meet again on [   ] to resolve differences regarding the exceptions below.

Describe these exceptions in the expandable text box labeled Exceptions: .

Ignore the Signature _____   Date _____ lines on the screen.

Click on **Save** or **Save & Continue** to continue working through your IEP.

Meeting Participants

In order for the appropriate signature lines to appear on the IEP signature page, you must select the meeting participants. Select [Meeting Participants] from the plan outline to open the editor below. Click on the [New Team Meeting] icon. If you have not already built your team for this student the following message appears below the text box. For instructions on building your team, refer to the Getting Started instructions.

IEP Meeting Participants

Print in IEP ▲

Please add Team Members by clicking on the Team Member tab before creating a meeting.

If you have built your team, a click on the [New Team Meeting] icon will bring up the editor below. Check the box for "Print in IEP." Check a box (either invited or attended) next to the names of those members for whom signature lines need to appear on the printed IEP.

Team Meeting Editor

Print In IEP

☐

Team Meeting Attendance Editor

Invited	Attended	Name	Title
☐	☐	Aamold, Corby	Mother (GUARDIAN)
☐	☐	Aamold, Ronald	(STUDENT)
☐	☐	Aamold, Todd	Father (GUARDIAN)
☐	☐	Administrator, or Designee	(ADVISORSTAFF)
☐	☐	Feller, Kris	(TEACHER)
☐	☐	Other, Meeting Participant	(ADVISORSTAFF)
☐	☐	Regular, Education Teacher	(SPEDSTAFF)
☐	☐	Special, Education Teacher	(SPEDSTAFF)
☐	☐	Speech/Language, Pathologist	(SPEDSTAFF)
☐	☐	Staff, Sped	(SPEDSTAFF)

After you have checked the appropriate boxes, click on the [Save] icon. When you print your IEP, the signature page will appear as shown on the next page.

IEP MEETING PARTICIPANTS		
Staff, Sped		
(SPEDSTAFF)	Signature - (SPEDSTAFF)	Date (Month/Day/Year)
Feller, Kris		
(TEACHER)	Signature - (TEACHER)	Date (Month/Day/Year)
Aamold, Ronald		
(STUDENT)	Signature - (STUDENT)	Date (Month/Day/Year)
Aamold, Todd		
Father (GUARDIAN)	Signature - Father (GUARDIAN)	Date (Month/Day/Year)
Aamold, Corby		
Mother (GUARDIAN)	Signature - Mother (GUARDIAN)	Date (Month/Day/Year)
Speech/Language, Pathologist		
(SPEDSTAFF)	Signature - (SPEDSTAFF)	Date (Month/Day/Year)
Special, Education Teacher		
(SPEDSTAFF)	Signature - (SPEDSTAFF)	Date (Month/Day/Year)
Regular, Education Teacher		
(SPEDSTAFF)	Signature - (SPEDSTAFF)	Date (Month/Day/Year)
Administrator, or Designee		
(ADVISORSTAFF)	Signature - (ADVISORSTAFF)	Date (Month/Day/Year)
Other, Meeting Participant		
(ADVISORSTAFF)	Signature - (ADVISORSTAFF)	Date (Month/Day/Year)

IEP Notes

To add notes of information discussed during the IEP meeting, select IEP Notes from the plan outline. To add the content to the expandable text box, type directly into the box or copy and paste text from another word processor.
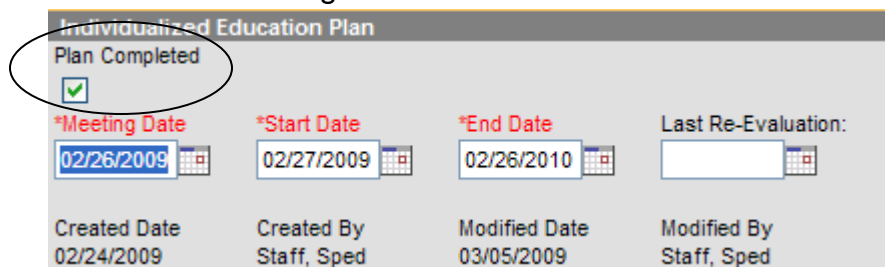
IEP Notes
Meeting Notes:

Expandable text box.

Click on Save or Save & Continue to continue working through your IEP.

Completing Your IEP

When you have completed your IEP, and the parents have signed it, you need to lock the IEP. Locking the IEP allows the OPI to extract data from it. This makes the IEP "uneditable" so you want to be sure that you are really done before taking this step. To lock the IEP, select the `Individualized Education Plan` editor from the plan outline. This will open up the first editor you worked with in your IEP. Check the "Plan Completed" box. You will receive the following validation:

Click "OK." The box is now checked.
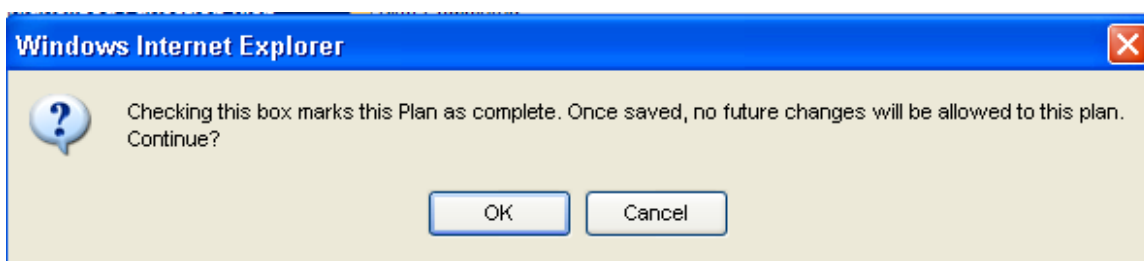
Click the 🖫 Save icon to store your work. You are returned to the Documents tab, and a lock icon appears next to the plan you just locked.

Technical NOTE: Locked IEPs

Do not check the "Plan Completed" box until the *Individualized Education Program* has been reviewed, printed, and signed by the team members. Once an IEP is locked, only an administrator can unlock it, so **DO NOT** lock an IEP unless it is complete.

Progress Reports

Under the Documents tab, click on "Create New Form" and choose, "Progress Report."

Choose which IEP you are reporting on and the Report Date

Plan Progress Report	
Assessment	
Progress Report	
Measurable Annual Goals	

Progress Report Editor	
Plan to report on (Start Date - End Date)	Report Date
MT IEP (04/18/2009-04/17/2010) ▼	

Click the 🖫 Save button.

Click on Measurable Annual Goals and the following screen will appear:

Progress Report on Plan Goals
Area of Concern:
PLAAFP: PLOP

Goal	Progress	Comments
This is the MAG for Reading	▼	

Choose the student's level of Progress and enter any Comments.

Click the 🖫 Save button.

Ignore any Security Violations that appear – your report HAS been saved.

Security: The business logic prevented a security violation. The current user needs access to the following tool codes: null.planning.Documents.ProgressReport,

Press Print to see a copy of the progress report.

The Progress Report will now be in your list of documents:

Documents List
📁 2009-2010 (8)
📁 Plans (1)
📁 MT Supplemental Documents (1)
🔒 Evaluations (1)
📁 Forms (3)
📁 Uploaded Forms (1)
📁 Progress Reports (1)
📄 MT IEP Progress Report (10/17/2009)

How to Amend an IEP

Highlight the IEP you want to amend
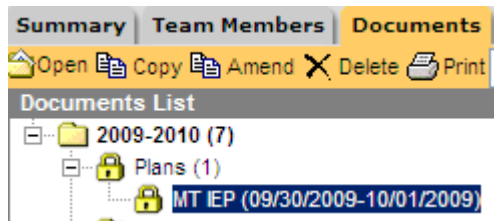
and click on "Amend" .

You will receive a warning,

Message from webpage

WARNING: You are about to amend this Education Plan. Do you want to continue?

OK   Cancel
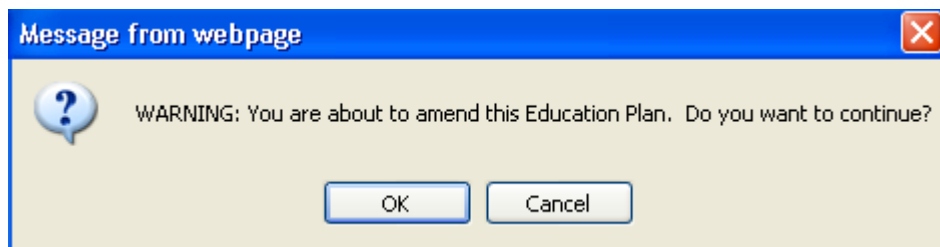
Click OK to continue.   This will open the Plan Amendment Editor.

Plan Amendment Editor

*Effective Date

08/26/2009

NOTE: Comments are required for any editor you select.

Editor	Reason for Amendment
Individualized Education Plan Montana IEP: Individualized Education Plan editor. Edit basic attributes of all education plans. This element should be the first item of any IEP	
State Reported Data (6-21) Montana IEP (Ages 6-21): Fetch state reported data for display on the IEP, and allow editing the local values on the plan. This Enrollment Status editor will also push special ed status values back to enrollment when plan has been saved and locked.	
Student Information Montana IEP: Student Information.	

Choose the part of the IEP to be changed and check the box in front of that area and enter the Reason for Amendment.

☑ **Special Education Services**
Montana IEP: SPED and Related Services

Has met all reading goals and no longer needs special education services for reading.

Then 💾 Save. You can then make changes to the appropriate areas of the IEP to change service hours, add PLAAFP/MAG, etc., and save the new IEP.
When you have saved and locked the amended IEP it will appear in your Documents list.

Documents List
- 📁 2009-2010 (12)
  - 📁 Plans (3)
    - 🔒 MT IEP (01/06/2010-12/22/2010) (Amended 1)
    - 🔒 MT IEP (12/23/2009-01/05/2010) (Amended Original)
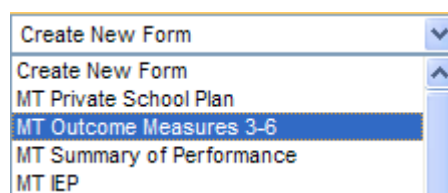
Note that the Amended IEP has the same end date as the original IEP.

Preschool Outcomes
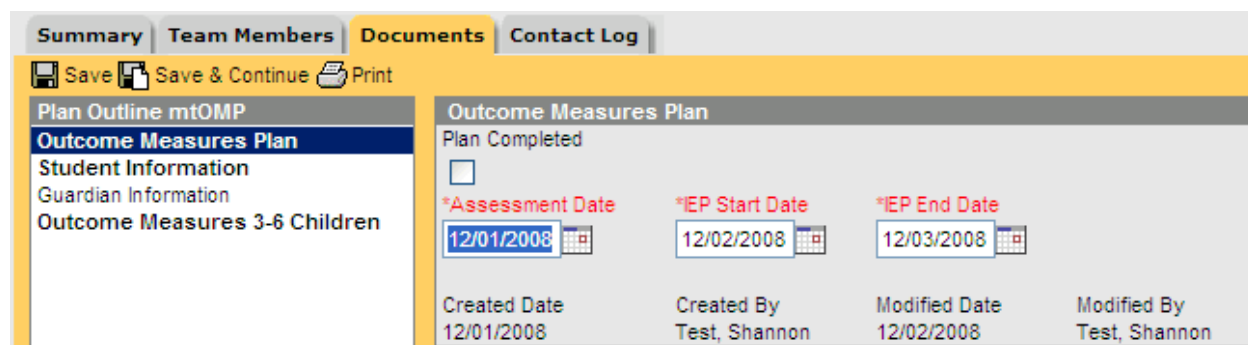
For any student who is 3, 4 or 5 years of age, the Preschool Outcomes document must be completed when he or she is *initially* found eligible for Special Education Services. The document must also be completed for any student who then leaves the preschool special education, either by leaving IDEA completely, by moving out of your district, or by turning 6.

If the student is 3, 4 or 5-years old, *and* had an IEP previously, *and* continues to need an IEP in order to receive a free, appropriate public education, this editor is *not* to be completed.

To create a Preschool Outcomes Plan, select MT Outcome Measures 3-6 from the Create New Form drop-down list on the Documents tab.

This will open up the Outcome Measures Plan editor. Enter the appropriate dates in the Assessment Date, IEP Start Date, and IEP End Date areas. The assessment date is the date on which the assessment(s) was completed for this student, and the IEP Start and End Dates correspond to the student's current IEP.

Click on Save or Save & Continue. Refresh your student and guardian information in the appropriate editors as you did in the *MT Evaluation Report* and the IEP.

Select the Outcome Measures 3-6 Children editor from the plan outline. The Outcome Measures for 3-6 Children editor will open. This editor requires you to make four decisions:
- Is this the student's Initial or Exiting Assessment,
- What assessments were used to measure level of performance,
- What number or rating best describes the student's level of performance, and
- Has the student shown any new skills or behavior since the last assessment (for exiting assessments only)?

Initial or Exiting Assessment?

The first question asks whether this is a student's initial assessment (student was just found eligible for IDEA services and has not had an IEP before) or her/his exiting assessment (student is leaving special education services completely, moving out of the district, or turning 6 years of age).

Check the ☐ Initial box if this is the student's initial assessment. Check the ☐ Exit box if the student is exiting from the IDEA and all special education and related services or the student has turned 6 but had an IEP as a 5 year old.

Check the box(es) for the assessment(s) used to determine the student's performance level(s). Use the expandable text box to identify specific instruments or procedures used to gather the data upon which the team rated the student's present level of performance related to each of the three factors. Use this box to add additional descriptive information about the assessment or rating procedure.

Outcome Measures for 3-6 Children

Do not complete this page if this is an INITIAL IEP for a 6-year-old student.

Type of Outcome Measures Evaluation:　　☐ Initial　☐ Exit

The IEP team must rate the child's present level of functional performance in the three areas below. Based on assessment, rate the child's performance in each area on a scale of 1-7 (whole numbers only). For students leaving preschool services, also note whether the child has shown new skills or behaviors since the last assessment.

Check the assessment procedure(s) used to draw these conclusions:

☐ Academic　　☐ Behavioral　　☐ Class-Based Assessment

☐ Communication　☐ Developmental　☐ Observations

☐ Psychological　☐ Social/Emotional　☐ Other: (Describe in NOTES)

Rating Present Level of Performance

Indicate which assessment or assessments were used to assess the child's present level of performance with regard to *each* of these factors:

- Positive social-emotional skills (including social relationships);
- Acquisition and use of knowledge and skills (including early language/ communication and early literacy); and

Positive Social-Emotional, including Social Relationships

Acquisition and Use Of Knowledge and Skills, including Early Language, Communication and Early Literacy

Use Of Appropriate Behaviors To Meet Individual Needs

- Use of appropriate behaviors to meet his or her needs.

Next, rate the student's present level of performance for each factor using a one to seven scale, and record that number in the box next to each factor.   You must rate each factor with a number from one to seven.   Use the drop-down list [2 ▼] to choose the number that best describes the student's present level of performance based on the rubric at the right.

Child shows functioning expected for his or her age in all or almost all everyday situations that are part of the child's life. Functioning is considered appropriate for his or her age. No one has any concerns about the child's functioning in this outcome area. There are no concerns about the child's functioning in this area.	7
Child shows functioning generally considered appropriate for his or her age, but there are some concerns about the child's functioning in this area.	6
Child shows functioning expected for his or her age some of the time and/or in some situations. Child's functioning is a mix of age-appropriate and not age-appropriate functioning. Functioning can be described as like that of a slightly younger child.	5
Child shows some, but not much, age-appropriate functioning.	4
Child does not yet show functioning expected of a child of his or her age in any situation. Child's behaviors and skills include immediate foundational skills upon which to build age-appropriate functioning. Functioning might be described as like that of a younger child.	3
Child's behaviors and skills include some immediate foundational skills, but these are not displayed very often across settings and situations.	2
Child does not yet show functioning expected of a child his or her age in any situation. Child's skills and behaviors do not yet include any immediate foundational skills upon which to build age-appropriate functioning. Child's functioning might be described as like that of a much younger child.	1

Use the scroll bar to move down to the bottom of the page, and for all students who are leaving Preschool, complete the questions at the bottom of the page, shown here.

Indicate whether the student acquired new skills by checking either the Yes or No box for each of the three factors.

Leaving Preschool ONLY: Has the child shown any new skills or behaviors since the assessment?		
Positive Social-Emotional Skills, including Social Relationships:	☐ Yes	☐ No
Acquisition And Use Of Knowledge And Skills, including Early Language, Communication And Early Literacy:	☐ Yes	☐ No
Use Of Appropriate Behaviors To Meet Individual Needs:	☐ Yes	☐ No

Please keep in mind that this query looks back to the time of the student's Initial IEP, not just the past year.
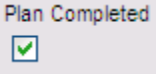
Note also that the term, Leaving Preschool ONLY: , means that the student:

- No longer has a disability *or* needs special education and related services, and exits from the IDEA program; or
- Is no longer 3, 4 or 5-years of age, regardless of continued eligibility under the IDEA; or
- Has otherwise exited from the IDEA, e.g., dropped out, moved, etc.

Click the Save icon to store your work.

Finish the Preschool Outcomes Editor by selecting the Outcome Measures Plan editor from the plan outline, and checking the completion box Plan Completed ☑ . Note that this Plan Completion assurance brings up the warning shown below.

Windows Internet Explorer

? Checking this box marks this Plan as complete. Once saved, no future changes will be allowed to this plan. Continue?

OK   Cancel
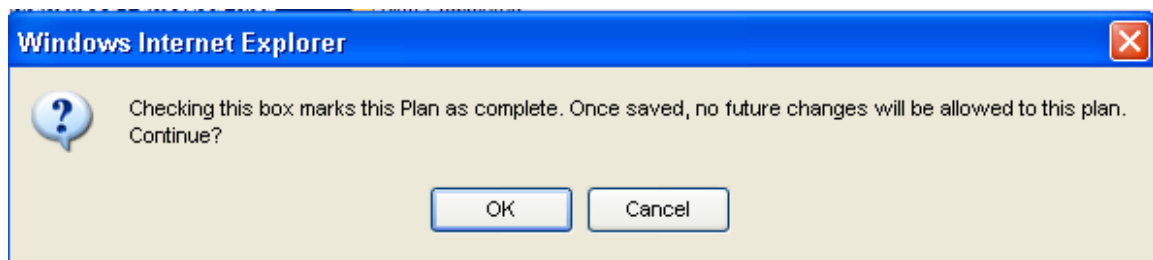
Click the Save icon to store your work.

Post-School Transition

The transition IEP is for use beginning at age 15 for all students and any other students for which the IEP team decides to do transition planning. The five editors are shown at the right.

Transition Services
Postsecondary Goals
Course of Study
Transition Services Needed
Transfer of Rights
High School Graduation

The first editor, Transition Services considers the student's desired post-secondary activities.   Use the Student's Desired Post-School Activities text box to capture any information

discussed. The 🗂 icon indicates that your district may have a district-produced template bank that will assist you to document these desired activities.

Next, summarize the results of any assessments conducted. Again, the 🗂 icon indicates that a template bank may be available.

Remember that three assessments (Training, Education, and Employment) must be conducted

Transition Services

Student's Desired Post-School Activities
(In the areas of postsecondary education, vocational education, integrated employment (including supported employment), continuing and adult education, adult services, independent living or community participation): 🗂

Results of Age-Appropriate Transition Assessments.
Training: 🗂

Education: 🗂

Employment: 🗂

Where appropriate, Independent Living Skills: 🗂

☐ Results of age-appropriate transition assessments attached

and their results summarized. Independent Living Skills must be assessed and results reported when appropriate. Instead of summarizing the assessment results in the text area under each assessment, you may attach them, but if you do so, check the box at the bottom of the editor. ☐ Results of age-appropriate transition assessments attached

Click on 🔲 Save or 🗐 Save & Continue to continue working through the editors.

Select **Postsecondary Goals** to open the editor below. Enter the measurable postsecondary
goals for Training
and/or Education,
Employment, or
where appropriate,
Independent Living
Skills into the
appropriate text box.
You may type the
information directly
into the box or use a
copy and paste
method. Again, the
⬚ icon beside each
box indicates that
your district may

Postsecondary Goals

Measurable postsecondary goals are based on age-appropriate transition assessments related to training, education, employment, and, if appropriate, independent living skills. Clearly specify the desired level of achievement.

Training or Education:⬚

Employment:⬚

Where appropriate, Independent Living Skills:⬚

have a district-produced template bank to guide your work. Click on 💾 Save or
📑 Save & Continue to continue working through the editors.

Select **Course of Study** from the plan outline to open the editor that shows the student's
Course of Study, as shown here. Enter the necessary information regarding
Anticipated Graduation Date: and **Credits Earned to Date:** into the text boxes at the top.
The * red colored type in the third box, ***Total number of credits for graduation:** indicates that this
information is required and must be entered in order to save the information.
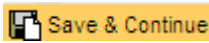
Course of Study

Anticipated Graduation Date:

Credits Earned to Date:

*Total number of credits for graduation:

Enter the school year, course title and credit information in the boxes. Each column
represents a semester.

School Year: 2008/2009		Credits:	
English 1	English 2	0.5	0.5
Geometry	Algebra	1	1
Biology	Biology	0.5	1

The system automatically sums the number of credits in both columns for both school years and enters that amount in the box at the bottom *Total Credits: . You cannot enter a number into this auto-filled box.

*Total Credits:	4.5

When finished, click the ⊞ Save & Continue button to move to the next editor.

Procedure Note: Course of Study

The Course of Study must indicate the coursework anticipated from the date of this IEP through the end of the school year and the coursework from the start of the coming school year through the duration of the annual IEP.

The Transition Services Needed editor allows the user to show that the IEP has considered the following seven topics: Instruction, Employment, Community Experiences, Post-School Adult Living, Related Services, Daily Living Skills, and Functional Behavior Assessment. Daily Living Skills must be considered only when appropriate.

The IEP team must discuss each of the seven topics. If after the discussion, the team decides that no action is necessary check the box Discussed, not needed ☑ .

Transition Services Needed
Each area must be considered by the IEP Team.

Instruction   Discussed, not needed ☑
Transition Services Needed to Assist the Student in Meeting Postsecondary Goals (include timeline for achievement)⊟

Person or Agency Responsible⊟

Employment   Discussed, not needed ☐
Transition Services Needed to Assist the Student in Meeting Postsecondary Goals (include timeline for achievement)⊟
Enter any needed transition services for Employment here.

Person or Agency Responsible⊟
Who is responsible for providing these services?

If the student needs services in any area, identify those needs in the text box. Note that the ⊟ icon indicates that a district-produced template bank may be available. Identify the person or agency responsible for providing or paying for that service in the lower box. Again the ⊟ icon indicates that a district-produced template bank may be available.

Transfer of Rights at Age of Majority

The student has been informed of his or her rights under IDEA that will transfer to the student on reaching the age of majority. The student must be informed at least one year before the student reaches age 18.

[ ] 📅	Date student was informed of the transfer of rights
05/07/2014	Date student reaches the age of majority

For students who will turn 17 before the end of the next IEP, the **Transfer of Rights** editor allows you to enter the date upon which the student was first informed of the transfer of rights. Always use the date on which the student was first informed of his or her rights. Either type the date into the text box in the dd/mm/yy format, or use the calendar function to mark the date. Note the **Transfer of Rights at Age of Majority** editor automatically pulls from the database the date on which the student reaches the age of majority.

For students in their last year of high school, the **High School Graduation** editor indicates the graduation and diploma options that will apply to this student at the end of the current school year. Check one of the three options that address the student's status regarding he district's graduation requirements, need for new measurable annual goals and new IEP, and graduation with a regular diploma.

High School Graduation

The IEP team determined that the student **will meet** the district's graduation requirements, or will substantially complete the measurable annual goals **and** will not need new measurable annual goals. The IEP team will not develop a new Individualized Education Program and the student **is** expected to graduate with a regular diploma at the end of the current school year. [ ]

The IEP team determined that the student **will not meet** the district's graduation requirements, **or** will not substantially complete the measurable annual goals, and will need new measurable annual goals for the coming school year. The student **is not** expected to graduate with a regular diploma at the end of the current school year and the IEP team must develop a new Individualized Education Program for the next school year. [ ]

The student **will not meet** the district's graduation requirements. The student **will not receive** a regular diploma. The district **will not provide special education services** for the next school year due to district policy on the age through which educational services are available to other students. [ ]

Student's Current Grade:

If you are unsure at the meeting which box to check, you may leave this editor blank and fill out the High School Graduation Simple Form at the end of the school year.

Note the **High School Graduation** editor automatically pulls from the database the student's current grade.

Click the 💾 Save icon to store your work.

Technical Note: Documenting Graduation

The district may use either the content of this editor within a completed, signed IEP to document the district's decision regarding graduation or the content of the *High School Graduation* form. The latter form is available under the Documents tab, Create New Forms drop-down menu.